

**CSI Handbook Development Post-Workshop Notes**  
**Sept 7, 2006**

**Introductions and Logistics**

- Introduction of CPUC / CEC staff and SGIP Program Administrators
- Sign in list gets access to handbook

**EPBB Calculation Tool RFP Update (Nina Master / SoCal Gas)**

- Working with internal purchasing department on scope of work to issue in the RFP. RFP anticipated to be completed within the next 10 days.

**Online Statewide Application Tool RFP Update (Natalie Osborne / SDREO)**

- Working on specs for RFP. Will seek public input before issuing RFP.

**PV Now update (Julie Blunden, SunPower)**

- Handed out slides describing handbook development proposals drafted prior to the workshop.
- Proposed Goals:
  - To collect and apply SGIP and ERP lessons from CEC staff and administrators into current effort ensuring an inclusive process.
  - Minimize process steps and paperwork and focus on organization steps that will ease revisions.
  - Establish explicit metrics for M&V and reporting.

**Reviewed Chapter Sections Described in the list of existing handbook chapters (attached).**

- Workshop attendees signed up to be contacts for each section – Attached: PLEASE NOTE: Only two chapter contacts are included in the attached list. If you signed up to participate for a chapter section and your name is not on the attached list, contact one of these contact persons to be officially added to the list by September 14<sup>th</sup>.
- Description of types of information in each section and ideal participants.
- Some chapter sections will be combined while other sections added if necessary.
- Sub-groups will organize to address several chapter sections where this makes sense.
- The CSI phase 1 decision made the meter subgroup mandatory.
- Utilize existing handbooks to draft chapter sections, omitting what is not applicable and adding sections that are missing.
- Use existing Decision as a guide. OK to include language not in the decision if appropriate; The final handbook is subject to public comment and Commission approval.

**Discussed SB1 Changes which impact handbook development. Place holders should be maintained within the handbook until these issues are resolved.**

- Budget Cap of \$2.16 Billion
- PBI for a larger number of applicants to begin January 1, 2008.
- 1 MW incentive cap.
- CEC to determine eligibility.
- Calendar based incentive decline.
- EE improvements required to received incentive.
- Time variant pricing required.
- Solar thermal effected by funding limitations.
- 10 year warranty requirement.
- Calculation tool should be addressed in the handbook

**Workshop participants agreed to ED proposed timeline schedule with additions (italics):**

September 7 <sup>th</sup>	Initial Workshop / Sub-group formation
Sep 8 <sup>th</sup> – Oct 8 <sup>th</sup>	Handbook Sub-Sections Drafted
October 9 <sup>th</sup>	Submission of 1 <sup>st</sup> Draft to Workshop Attendees for Comment
<i>October 11<sup>th</sup></i>	<i>Participants may send comments to the attendee list for discussion 2<sup>nd</sup> workshop (see below).</i>
October 12 <sup>th</sup>	Second Workshop to Present Draft Handbook to Interested Stakeholders
<i>October 13<sup>th</sup></i>	<i>Participants may send post-workshop comments to the attendee list.</i>
October 20 <sup>th</sup>	Final Draft Handbook Due to Energy Division EOB
October 23 <sup>rd</sup>	Ruling Sent with Draft Handbook Attached for Public Comment
November 7 <sup>th</sup>	Opening Comments Due
November 17 <sup>th</sup>	Reply Comments Due
November 30 <sup>th</sup>	Final Handbook Ruling

(NOTE: Participants may meet, confer, and establish independent schedules, including drafts, among themselves in order to adhere to the above scheduled timeline. ED maintains that additional independent efforts shall occur in consensus with all handbook participants and no one independent entity shall dictate the method for pursuing these activities. ED strongly urges participants to arrive at one consensus document according to the schedule above. If multiple handbooks are submitted a Decision may be required in order to formally adopt the handbook, potentially causing delays for the program start date.)

**Participants offered various suggestions for consideration during handbook development process:**

- Measurement and evaluation data should be collect during application process.
- Process for handbook modification should be included in handbook.
- Data transparency, performance: for PBI category we should include a requirement that developers report expected loss factors due to tilt, shading, etc. including the assumptions they used.
- Transitional section should include a process for preserving and disseminating existing data over the life of the SGIP and ERP.
- Transmission access and requirements-- need to transition the data from CEC into the PUC tools for continuity.

**Handbook Development process / Technical Writing / Tying in all the chapter pieces**

- The SGIP program administrators will serve the technical writing function or contract this out to a qualified vendor.
- SGIP PA's will also serve to answer questions regarding why certain program requirements are included in the existing handbooks, initiating communication with CEC staff concerning ERP guidebook questions.
- Public participation will occur through chapter sub-group liaisons in order to prevent confusion in communications with the PA's and ED staff.
- SGIP PA's to provide weekly status report to ED staff beginning September 15th.
- Sub-group liaisons will also communicate and provide weekly status reports to the workshop attendee list indicating progress beginning September 15<sup>th</sup>.
- By September 15<sup>th</sup> chapter contact persons (Attached) will provide to ED:
  - which subgroups will be handling what chapter sections,
  - participant information for each sub-group, and
  - sub-group liaisons.
- ED will send this sub-group list to all workshop attendees.
- ED Staff Contact: [LP1@cpuc.ca.gov](mailto:LP1@cpuc.ca.gov)

## Contact Volunteers for Each Chapter Section

### I. Program Eligibility

Julie Blunden, SunPower, 408-240-5577, [Julie.blunden@sunpowercorp.com](mailto:Julie.blunden@sunpowercorp.com)

Maric Munn, University of California, 510-987-9392, [maric.munn@ucop.edu](mailto:maric.munn@ucop.edu)

### II. ERP / SGIP Transition Issues

Kevin Prince, Powerlight, 510-868-1328, [kprince@powerlight.com](mailto:kprince@powerlight.com)

Jan McFarland, ASPv, 916-346-2578, [janmcfar@sonic.net](mailto:janmcfar@sonic.net)

### III. Metering

Howard Green, SCE, 626-302-8436, [greenh@sce.com](mailto:greenh@sce.com)

David Kopans, Fat Spaniel, 617-947-2454, [david.kopans@fatspaniel.com](mailto:david.kopans@fatspaniel.com)

### IV. Incentive Calculation / EPBB / PBI

JP Ross, Vote Solar, 415-874-7437, [jpross@votesolar.org](mailto:jpross@votesolar.org)

Chris O'Brien, Sharp Solar, 202-486-3427, [obrienc@sharpsec.com](mailto:obrienc@sharpsec.com)

### V. Applications & Payment Process

Angela Levazzo, Sun Edison, 949-394-6916, [alavezzo@sunedison.com](mailto:alavezzo@sunedison.com)

Jan McFarland, ASPv, 916-346-2578, [janmcfar@sonic.net](mailto:janmcfar@sonic.net)

### VI. Changes to Incentive Reservations

Steve Chadima, Energy Innovations, 626-535-2784, [steve@energyinnovations.com](mailto:steve@energyinnovations.com)

Paul Detering, CerOx, 650-492-0611, [paul@cerox.com](mailto:paul@cerox.com)

### VII. Connection to Utility

Mathew Culligan, Powerlight, 510-868-1267, [mculligan@powerlight.com](mailto:mculligan@powerlight.com)

### VIII. Site Access & System Information Sharing

Tom Beach, Crossborder Energy, 510-549-6922, [tomb@crossborderenergy.com](mailto:tomb@crossborderenergy.com)

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